

BCBSF History and Archives DRAFT Project Proposal

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Background

Several market and societal forces are driving Blue Cross and Blue Shield of Florida to move at an ever-increasing faster pace to succeed and maintain our leadership position. As we continue to keep pace with technological advances, it is imperative that we make efforts now to preserve the Company's rich past history.

In response to a request from the Office of the President, a work group, the BCBSF History Project Team, has, since mid-April, examined ways to capture and record Blue the Company's rich history. The proposed initiative will involve gathering memorabilia, files, proposals and reports; interviewing former executives and board members; and cataloging a significant amount of written and photographic material in a corporate archive. While more work needs to be completed before a definitive work plan is produced, this proposal details the groups' broad-based goals, approach and budget estimate to complete the project. The project team will develop a comprehensive work plan pending senior management's approval to proceed with and fund this important initiative.

Goals

The preliminary goals of the history and archives project include, but are not limited to:

- Preserving our company's heritage – gain an appreciation of our corporate culture, understand our accomplishments and appreciate those who contributed to making BCBSF a strong, successful company.
- Communicating our company's story as appropriate to employees, board of directors, retirees, customers and the public.
- Leveraging our company's past to facilitate better decision-making for the future.
- Building a corporate archives and establish processes to catalogue and continually gather current and future company material including photographs, documents, publications and memorabilia.
- Initiating oral histories to preserve corporate memories from a generation of retirees and long-time employees.

Approach

Based on the information gathered thus far, the BCBSF History Project Team proposes a three tiered approach to preserving our corporate history.

1. Establish a permanent BCBSF archive.
2. Capture verbal histories from current and former executives, board members and employees.

3. Based on information gathered, determine the most appropriate ways to display archives and share the corporate history with external and internal audiences.

Overview of Project Components

1. Create an Official Corporate Archive

The BRIC will take responsibility for establishing an official “Corporate Archives” program. The archives will serve as a centralized historical information research center and play a vital role in maintaining the continuity of — and capitalizing on — the richness of BCBSF’s heritage and values. The Archives staff will acquire, preserve and provide information from materials documenting the history of the Company and of its products, subsidiaries, employees and policies. A major part of this effort will involve asking current and former board members, officers and employees to donate memorabilia they may have saved from their tenure with BCBSF.

During the archive creation phase, BRIC staff will:

- Develop a comprehensive archives policy. (Note: the draft policy and procedure is already underway.)
- Collect and preserve archival materials that illustrate the growth and development of BCBSF. (Note: Jan Rogers recently sent letters to former board members and executives asking them to donate or lend us BCBSF memorabilia as part of the project.) The BRIC staff will also assist in actively locating and gathering records throughout the organization.
- Catalog, index, digitize. This includes creating a rational organizational scheme for storing the records that will facilitate retrieval in the future. A database will be created using the BRIC’s “Inmagic” software. Ideally, this database will be made available via the Corporate Intranet.
- Provide adequate and appropriate conditions for the storage, protection, and preservation of archival material. This includes packaging materials in acid free boxes and storing them in a secure, climate-controlled location. All boxes and folders will be labeled for easy identification.
- Provide regular reference services to individuals interested in the activities and holdings of the Archives.

Resources Required in 2000

BRIC has already identified outside consultants who would assist in setting up the corporate archive. BRIC would work with this contractor approximately 20 hours per week during the initial start-up, archive design and cataloging phases. If BCBSF is committed to maintaining a permanent, ongoing archives program, BRIC will require a full-time employee to manage the archive going forward.

Other costs to set up the archive will be minimal. BRIC already has the software necessary to build the database and available space, shelving and PCs required to begin the project.

Budget estimate: [TBD with input from Margie Pace]

2. Capture Oral Histories

According to an old African saying, “when an elder dies, it is as if an entire library burns down.” The same could be said for preserving a corporate history. Presently, a large part of BCBSF’s corporate heritage is preserved in the memories of former board members, executives and long time employees. These memories are a perishable commodity; elements of which are lost every day. BCBSF can safeguard against losing more of its rich heritage preserve by capturing its oral history through interviews with people who helped shape the company.

Now is that time to begin capturing BCBSF’s history. Accordingly, the History Project Team has identified two local historians who would help us capture and record BCBSF’s history. While the historian would research and document the company’s evolution from start-up to its current position as an industry leader, his most valuable work will come from interviews with former executives, board members and employees. The historian, working with a member of the public relations and corporate communications staff, will conduct one-on-one and/or small group meetings interviews over a six- to nine-month period to capture memories, anecdotes and stories about BCBSF’s past. All interviews will be transcribed and some will be videotaped. Interview schedules, discussion guides and other logistics will be developed as part of the History Project Work Plan. Based on preliminary conversations with one consultant, the interview process will take at least one year to complete at a cost of approximately \$2,000 per month or \$24,000.

3. Identify Opportunities to Use History and Archives

Once the memorabilia is gathered, an archive formed and histories collected, the History Project Team will work with senior leadership to determine how BCBSF will use and preserve this material and information. Identification of opportunities to use the history and archives will be the responsibility of the work group. Keeping in mind

the goals of the project and BCBSF's corporate values, there are numerous ways to make good use of the material. Ideas such as videos, a corporate yearbook, multimedia presentations and permanent "Wall of Fame" display have been discussed. The History Team would tie together several different approaches -- for example, a "Wall of Fame" in the lobby, corporate yearbook and video -- to celebrate the company's rich history and successes with internal and external audiences. The project will certainly be used to celebrate the Company's 60th anniversary in 2004.

Production of a written history, corporate video, "Wall of Fame" or other project display alternatives will be budgeted as part of the final work plan.

Efforts should be made to maintain an institutional history which would have more value from a leadership and managerial point of view. For this reason, the History Project should not be viewed as a single work product but a continuing process that would will require a continuous commitment from senior leadership.